

A Profile of Visitors to Rural Alaska

Alaska Travelers Survey

PREPARED FOR:

***State of Alaska
Department of Commerce, Community
and Economic Development***



Research-Based Consulting

Juneau
Anchorage

March 2006

A Profile of Visitors to Rural Alaska

Alaska Travelers Survey

PREPARED FOR:

***State of Alaska
Department of Commerce, Community
and Economic Development***

PREPARED BY:



Juneau • Anchorage

March 2006

TABLE OF CONTENTS

Introduction and Methodology..... 1

Statewide Rural Visitor Profile 3

 Visitor Experience..... 3

 Visitor Satisfaction 8

 Trip Planning 9

 Previous and Future Alaska Travel 12

 Demographics 13

Repeat and Niche Market Analysis..... 15

Trend Analysis..... 22

Urban-Only Analysis..... 24

Appendix..... 26

Introduction

In order to learn more about visitors to rural Alaska, and specifically to four distinct regions of Alaska, the Alaska Department of Commerce, Community and Economic Development contracted with the McDowell Group, Inc. to provide visitor information from its proprietary visitor database, the *Alaska Travelers Survey*. This report presents a profile of all non-cruise visitors who overnighted in rural Alaska, statewide.

The *Alaska Travelers Survey* is an ongoing research program that provides current information on Alaska visitor characteristics including satisfaction ratings, travel patterns, demographics and trip planning. In 2005, the *Alaska Travelers Survey* program included nearly 6,000 personal interviews statewide. Visitors using all major transportation modes—air, cruise ship, ferry and highway—were interviewed. The program excludes Alaska residents, visitors traveling exclusively for business, and seasonal employees. Because fielding and data processing costs are shared among multiple subscribers, the *Alaska Travelers Survey* allows clients like the DCCED to obtain market research in a more efficient and affordable manner.

Methodology

This report presents a profile of Alaska non-cruise visitors who spent at least one night in a rural location. In addition, it contains special analyses of five niche markets of interest to DCCED: repeat travelers, cultural visitors, wildlife viewing visitors, adventure visitors, and fishing visitors. There is a chapter on trends in the rural visitor market, comparing 2003 and 2005 *Alaska Travelers Survey* data. There is also a chapter devoted to the “urban-only” market (visitors who did not spend any nights in any rural locations), which helps to illustrate key differences between visitors who do and do not visit rural visitors to the state.

The rural visitor sample consists of 1,175 surveys conducted in multiple locations throughout Alaska between May and September 2005. The maximum margin of error for this sample is ± 2.9 percent at the 95 percent confidence level. Due to the nature of response distribution in sampling statistics, most survey responses are more accurate than the maximum margin of error suggests.

The rural sample is pulled from the *Alaska Travelers Survey* non-cruise database, consisting of 2,320 visitors. Surveys were conducted in the Anchorage, Fairbanks, Juneau, Ketchikan and Sitka airports; at several locations near Tok, Alaska; and onboard Alaska Marine Highway vessels departing Alaska for Prince Rupert, BC and Bellingham, WA. Only visitors who were departing the state were interviewed. Respondents were selected randomly throughout the summer season. Survey data was weighted to reflect the actual number of visitors that exited Alaska from each survey location.

For the purpose of this report, DCCED has requested that rural Alaska be defined as:

A community of 6,500 or less not connected by road or rail to Anchorage or Fairbanks OR with a population of 1,600 or less that is connected by road or rail to Anchorage or Fairbanks.

Using this definition, respondents were identified as “rural visitors” if they spent at least one night in any of the following locations or communities: Cantwell, Copper Center, Denali, Glacier Bay, Glennallen, Gustavus, Haines, Healy, Kake, Nome, Petersburg, Prince of Wales Island, Skagway, Talkeetna, Trapper Creek, Tok, or Wrangell. In addition, visitors who listed “other” locations (coded by region but not individually due to small sample sizes) were considered rural.

The data describing trip behavior and travel patterns by rural visitors refers to their entire Alaska trip, not just the rural portions of their trip.

Map of Target Rural Regions

Four rural regions were targeted by DCCED in this survey project. Below is a copy of the map that was shown to visitors to identify whether they had visited the four rural regions.



STATEWIDE RURAL VISITOR PROFILE

This chapter presents a profile of visitors to Alaska who spent at least one night in a rural location, representing the potential market for rural communities. The total sample size is 1,175.

The chapter provides some results based on trip purpose (vacation/pleasure, visiting friends/relatives, and business/pleasure) and mode of exit (air, ferry, and highway), where the results are particularly relevant. A complete set of survey results based to these sub-groups can be found in the Appendix.

Visitor Experience

Trip Purpose

- Vacation/pleasure was the dominant purpose of travel among visitors to rural Alaska, accounting for 82 percent. One out of seven said their main purpose was to visit friends or relatives (VFR), and 4 percent were traveling for business and pleasure combined. (Visitors traveling solely for the purpose of business were screened out of the survey.)
- Visitors departing by air were much more likely to be visiting friends and relatives (17 percent) compared to those exiting by ferry (8 percent) or highway (3 percent).
- Sample sizes are provided in the table below, as subsequent analysis in this chapter includes comparison of visitors by trip purpose.

Trip Purpose
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

% of Rural Visitors	
Vacation/pleasure (n=945)	82%
Visiting friends and relatives (n=173)	14
Business/pleasure (n=57)	4

Mode of Entry and Exit to/from Alaska

- Three-quarters of visitors to rural Alaska entered or exited the state via airplane. Nearly all of the rest traveled via highway.
- This chapter also includes comparison of visitors by exit mode. The sample sizes are: 785 air exiters, 203 ferry exiters, and 187 highway exiters.

Mode of Entry and Exit to/from Alaska
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	% of Rural Visitors	
	Entry	Exit
Air	76%	76%
Highway	20	18
Ferry	3	6
Other	1	-

Length of Stay

- Rural visitors to Alaska spent an average of 12.5 nights in the state. Vacation/pleasure visitors tended to stay just slightly longer than VFR's, while business/pleasure visitors reported the longest length of stay.
- Visitors who exited the state via ferry had the longest average length of stay, at 19.1 nights. They were followed by highway exiters at 15.6 nights. Air exiters reported an average of 11.2 nights in Alaska.

Average Length of Stay in Alaska
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

Rural Visitors: Number of Nights	
All rural visitors	12.5
Vacation/pleasure	12.4
Visiting friends and relatives	12.1
Business/pleasure	16.0
Exited by air	11.2
Exited by highway	15.6
Exited by ferry	19.1

Accommodations

- Over half of rural visitors stayed in a hotel or motel while in Alaska. Lodges/resorts and camping were each used by 28 percent of visitors. Private home and RV/vehicle round out the top five types of lodging used by rural visitors.
- Not surprisingly, VFR's were much more likely to stay in private homes (80 percent, compared to 15 percent of vacation/pleasure visitors). Vacation/pleasure visitors were nearly twice as likely as VFR's to stay in a hotel/motel (56 versus 31 percent).
- Highway visitors were by far the most likely to report sleeping in their RV or vehicle (64 percent), compared to 35 percent of ferry visitors and 10 percent of air visitors.

Accommodations Used in Alaska
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

% of Rural Visitors	
Hotel/motel	53%
Lodge/resort	28
Camping (tent/cabin)	28
Private home	25
RV/vehicle	21
Bed and breakfast	12
Boat/ferry	10
Other	2

Overnight Destinations

- Southcentral was the most common region visited among rural visitors at 78 percent, followed by the Interior (63 percent) and Southeast (22 percent). Southwest (10 percent) and Far North (5 percent) were the least-visited regions.
- The most popular community among rural visitors was Anchorage, with 62 percent spending at least one night there. Just under half (46 percent) visited Denali, while a similar number (44 percent) visited the Kenai Peninsula.
- Rural visitors reported overnighing in an average of 3.7 communities while in Alaska. This number was highest among ferry visitors (6.2 communities), followed by highway visitors (4.0 communities) and air visitors (3.4 communities).

Overnight Destinations
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	% of Rural Visitors
Southcentral	78%
Anchorage	62
Kenai Peninsula	44
Seward	27
Homer	19
Kenai/Soldotna	14
Valdez	14
Palmer/Wasilla	11
Talkeetna	11
Glennallen/Copper Center	9
Girdwood/Alyeska	3
Interior	63
Denali/Healy/Cantwell	46
Fairbanks	27
Tok	22
Southeast	22
Juneau	8
Ketchikan	4
Sitka	2
Skagway	6
Haines	5
Prince of Wales Island	4
Petersburg	3
Glacier Bay/Gustavus	2
Wrangell	1
Southwest	10
Kodiak	2
Far North	5
Nome	2

Visitor Activities

- Survey respondents were shown a list of activities and asked what they participated in while in Alaska. The number one activity was shopping, at 61 percent, followed closely by wildlife viewing at 59 percent. (Wildlife viewing includes whale watching, bear viewing, bird watching, and other activities.) Over one-quarter of rural visitors said they participated in bear watching, while 16 percent participated in bird watching.
- Fishing was extremely popular among rural visitors, with nearly half saying they participated in unguided fishing (28 percent) and/or guided fishing (25 percent).
- Just under half of rural visitors reported participating in cultural activities, including museums/historical sites, Native culture tours and activities, and gold panning or mine tours.
- Other activities participated in by more than one-quarter of visitors included hiking/nature walk (44 percent), day cruise (43 percent), and visiting friends and relatives (27 percent).

Participation in Tours and Activities
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	% of Rural Visitors
Shopping	61%
Wildlife/marinelife viewing	59
Bear viewing	28
Bird watching	16
Fishing	46
Fishing (unguided)	28
Fishing (guided)	25
Cultural activities	46
Museums/historical sites	37
Native culture tours/activities	18
Gold panning/mine tour	11
Hiking/nature walk	44
Day cruise	43
Visiting friends/relatives	27
City tour	25
Camping	20
Boating	17
Flightseeing	16
Train	13
Alaska Railroad	9
White Pass	4

Table continued, next page

Participation in Tours and Activities (cont'd)
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	% of Rural Visitors
Rafting	13
Kayaking/canoeing	9
Tramway/gondola	5
Business	5
Biking	4
Hunting	3
Dog sled/kennel tour	2
Garden/rainforest tour	1
Other activities	11

Visitor Expenditures

- Respondents were asked how much their party spent on their Alaska trip, excluding travel to and from the state. The table below shows average spending results per party and per person for all rural visitors, as well as results by trip purpose. Sample sizes for those who responded to this question are provided in parentheses.
- Rural visitors spent an average of \$1,767 per person and \$4,157 per party on their Alaska trip. Per-person figures were significantly higher when compared to visitors who did not visit any rural communities (\$1,767 compared to \$984). (More details on “urban-only” visitors can be found on pages 24-25.)
- Spending was nearly twice as high among vacation/pleasure visitors (\$1,937 per person) compared to VFR’s (\$1,006 per person).

Visitor Expenditures in Alaska
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	Rural Visitors	
	Per Person	Per Party
All Rural Visitors	\$1,767	\$4,157
Vacation/pleasure visitors	1,937	4,559
Visiting friends/relatives	1,006	1,944
Business/pleasure	1,096	3,969
Exited by air	1,922	4,501
Exited by ferry	1,621	3,613
Exited by highway	1,199	2,958

Note: Spending does not include transportation to or from Alaska.

Visitor Satisfaction

- Rural visitors report very high satisfaction ratings with their overall Alaska experience, with 83 percent saying they were very satisfied, and nearly all of the rest saying they were satisfied.
- Satisfaction ratings were consistent among the different trip purposes.
- Highway travelers reported a slightly higher “very satisfied” rate (93 percent) compared to air (81 percent) and ferry (80 percent).
- Wildlife viewing experiences were rated much lower than the overall Alaska experience, although satisfaction was still generally high. Just 5 percent of visitors said they were dissatisfied.
- Highway visitors tended to be much more satisfied with their wildlife viewing experiences (86 percent very satisfied) compared to air visitors (61 percent) and ferry visitors (51 percent).

Satisfaction Ratings
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied
Overall experience in Alaska	83%	14%	1%	1%	<1%
Vacation/pleasure	83	14	1	1	<1
Visiting friends/relatives	81	17	<1	1	<1
Business/pleasure	81	18	1	0	0
Exited by air	81	16	1	1	<1
Exited by ferry	80	18	1	1	1
Exited by highway	93	7	0	1	0
Wildlife viewing experiences	65	24	6	4	1
Vacation/pleasure	66	23	6	4	1
Visiting friends/relatives	60	27	8	5	0
Business/pleasure	69	24	1	5	0
Exited by air	61	27	7	5	1
Exited by ferry	51	37	7	4	1
Exited by highway	86	8	3	3	0

Trip Planning

Advance Planning Time

- On average, rural visitors decided to travel to Alaska 8.2 months in advance of their trip, and made their booking arrangements 3.9 months in advance.
- Over one-quarter of rural visitors made their trip decision within three months of travel, and 51 percent booked their trip in the same time period.
- VFR's show the shortest average lead times, at 5.4 months for the trip decision and 2.9 months for booking. This compares to 8.8 and 4.2 months among vacation/pleasure visitors.

Advance Time for Trip Decision and Booking
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

% of Rural Visitors	
How far in advance did you decide to come on this trip to Alaska?	
Three months or less	27%
Four to six months	29
Seven to eleven months	15
One year or more	29
Average # months	8.2 months
How far in advance did you book your major travel arrangements?	
Three months or less	51%
Four to six months	33
Seven to eleven months	11
One year or more	5
Average # months	3.9 months

Internet Use

- Three-quarters of rural visitors said they used the Internet to plan their trip, including half who said they booked some portion of their travel using this method.
- Vacation/pleasure visitors were slightly more likely than VFR's to have used the Internet (77 versus 69 percent), but VFR's were slightly more likely to have booked over the Internet (56 versus 49 percent).
- Visitors traveling by air were much more likely to book over the Internet, at 59 percent (compared to 29 percent of ferry visitors and 20 percent of highway visitors).

- The most common item booked over the Internet was airfare at 83 percent, followed by lodging at 41 percent and vehicle rental at 33 percent.

Internet Use

Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

% of Rural Visitors	
Used Internet	75%
Research only	26
Research and book	50
Which portions of your trip did you book over the Internet? (Base: Booked over the Internet)	
Airfare	83%
Lodging	41
Vehicle rental	33
Tours	22
Ferry	8
Overnight packages	4
Other	3

Travel Agent Use

- One out of four rural visitors reported using a travel agent in booking their Alaska trip. VFR's were less likely, at 18 percent, compared to 26 percent of vacation/pleasure visitors.
- Travel agents were most commonly used to book airfare (80 percent), followed by lodging (52 percent) and tours (47 percent).

Travel Agent Use

Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

% of Rural Visitors	
Did you use a travel agent?	
Yes	25%
No	75
Which portions did you book through a travel agent? (Base: used travel agent)	
Airfare	80%
Lodging	52
Tours	47
Vehicle rental	22
Overnight packages	12
Ferry	9
Other	2

Other Sources of Information

- Other than the Internet, rural visitors tend to rely on friends/family and guidebooks for their trip planning information. The Milepost was used by one out of six visitors.
- Although VFR's were heavy users of friends/family (77 percent), a significant portion of vacation/pleasure visitors (39 percent) also mentioned this source.

Information Sources About Alaska (Other than Internet and Travel Agent) Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	% of Rural Visitors
Friends/family	44%
Guidebooks	31
Milepost	16
Frommers	5
Lonely Planet	5
Prior experience	26
Brochures	18
AAA	9
Magazine	8
Convention and Visitors Bureau	6
Ferry brochure/schedule	6
Community brochures	6
Library	3
Alaska State Vacation Planner	3
Lodging	3
Club/organization	2
Travel shows	2
Newspaper	2
Cruise line	1
North to Alaska Guide	1
Lodging	1
None	3
Other	7

* Top-of-mind recall.

Previous and Future Alaska Travel

- Over half of rural visitors had been to Alaska before. The rate was much higher among VFR's (68 percent) than among vacation/pleasure visitors (37 percent).
- Highway visitors were much less likely to have been to Alaska before (17 percent) when compared to ferry visitors (39 percent) or air visitors (48 percent).
- Of repeat visitors, nearly three-quarters had traveled to and/or from the state via airplane on their last trip; 14 percent via highway; 10 percent via cruise ship; and 4 percent via ferry.
- The rate of repeat travelers who cruised on their last Alaska trip was higher among rural visitors (10 percent) than among non-rural visitors (4 percent).
- Over half of rural visitors said they were very likely to return to Alaska (61 percent).

Previous and Future Alaska Travel
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

% of Rural Visitors	
Is this your first trip to Alaska?	
Yes	58%
No	42
Mode of transportation used to enter/exit Alaska on previous trip (Base: Previously visited Alaska)	
Air	72%
Highway	14
Cruise ship	10
Ferry	4
Other	1
How likely are you to return to Alaska?	
Very likely	61%
Likely	22
Unlikely	10
Very unlikely	3

Demographics

Visitor Origin

- Western visitors represent nearly half of all rural visitors. The other three regions account for similar percentages of rural visitors (15 percent Midwest, 15 percent South, and 11 percent East).
- One out of seven rural visitors (15 percent) are international. This compares to just 4 percent of non-rural visitors.
- Vacation/pleasure visitors were less likely than VFR's to be from the West (41 percent, compared to 64 percent). They were much more likely to be international (18 versus 3 percent).

Visitor Origin

Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

% of Rural Visitors	
Western US	45%
California	16
Washington	9
Oregon	5
Midwestern US	15
Michigan	2
Wisconsin	2
Illinois	2
Southern US	15
Texas	4
Florida	3
Eastern U.S.	11
New York	2
Pennsylvania	2
International	15
Germany	3
Canada	3
United Kingdom	2
Australia	2

Other Demographics

- Rural Alaska visitors were slightly more likely to be male (59 percent). VFR's were more likely to be female (55 percent) than other visitors.
- The most common age range among visitors was 45-64, representing 47 percent of all visitors. The average age was 50.1 years old.
- Rural visitors reported an average party size of 2.7 people. Party size was higher among vacation/pleasure visitors (2.8 people) when compared to VFR's (2.2 people).
- Just over half of rural visitors reported obtaining a college degree.
- The average income reported by visitors was \$91,200. Air visitors reported the highest average income at \$97,500, followed by ferry at \$80,200 and highway at \$71,000.

Visitor Demographics
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

% of Rural Visitors	
Gender (cumulative)	
Male	59%
Female	41
Age (cumulative)	
1-18 years old	8%
19-34 years old	14
35-44 years old	13
45-64 years old	47
Over 65 years old	17
Average age	50.1 years old
Average party size	2.7 people
Education	
Less than H.S. diploma	2%
High School Grad/GED	17
Vocational Cert.	6
Some College	15
AA degree	6
College graduate	53
Bachelor's	26
Master's	18
Doctorate	9
Average household income	
Mean income	\$91,200
Refused	12%

REPEAT AND NICHE MARKET ANALYSIS

This chapter presents summary profiles of five different sub-samples of visitors to rural Alaska. This information is provided in order for rural communities and businesses to target the niche markets that are most likely to visit rural Alaska.

- **Repeat Travelers** (n=510): These visitors had been to Alaska previously.
- **Cultural Visitors** (n=568): These visitors participated in one or more of the following activities: museums, historical sites, Native culture tours and activities, gold panning, and mine tours.
- **Wildlife Viewing Visitors** (n=739): These visitors participated in wildlife viewing, including bear viewing, bird watching, whale watching, and other wildlife viewing.
- **Adventure Travelers** (n=670): These visitors participated in one or more of the following activities: biking, camping, canoeing, hiking, kayaking, and rafting.
- **Fishing Visitors** (n=547): These visitors went fishing at some point on their Alaska trip.

Characteristics of these niche markets are discussed below, followed by a table for each market that summarizes survey results alongside the overall rural market.

Repeat Travelers (page 17)

- Repeat travelers were less likely to be visiting for vacation/pleasure (73 versus 82 percent) and more likely to be VFR's (23 versus 14 percent) when compared to all rural visitors.
- Repeat travelers tended to travel less widely around the state, reporting lower visitation rates to nearly every community.
- The repeat market also participated in fewer activities, with the exception of fishing. They were more likely to participate in fishing (57 versus 46 percent).
- Repeat travelers were much more likely to rely on prior experience (57 versus 26 percent). They tended to use other information sources at a lower rate.
- Repeat travelers were more likely to be from the West (60 versus 45 percent). They were half as likely to be international (7 versus 15 percent).

Cultural Visitors (page 18)

- Visitors who participated in cultural activities while in Alaska tended to travel more widely throughout the state. Nearly two-thirds visited Denali, compared to 46 percent of all rural visitors. They were also more likely to visit Anchorage (73 versus 62 percent) and Fairbanks (46 versus 27 percent).
- Cultural visitors participated in most activities at a higher rate than the overall rural market, with the exception of fishing. They were less likely to go fishing.
- Cultural visitors tended to stay in Alaska slightly longer (14.1 nights, compared to 12.5 nights for the total rural market).
- Cultural visitors were more likely to use guidebooks (40 versus 31 percent), and reported a higher usage of most information sources.

- Cultural visitors reported a slightly higher average spending than other visitors.
- They were less likely to be repeat travelers (33 versus 42 percent).
- Cultural visitors were less likely to be from the West (36 versus 45 percent).
- Cultural visitors were more likely to be female (51 versus 41 percent).

Wildlife Viewing Visitors (page 19)

- The wildlife viewing market closely resembled the overall rural market, with a few exceptions.
- Wildlife viewers traveled a little more widely, and spent slightly more time in the state.
- They participated in activities at a higher rate, with the exception of fishing.
- They were slightly less likely to have been to Alaska before.

Adventure Travelers (page 20)

- Adventure travelers tended to stay slightly longer in Alaska.
- They also participated in more activities, with the exception of fishing. They were particularly likely to go hiking (77 percent, compared to 44 percent of the overall rural market).
- This market was slightly less likely to have been to Alaska before.
- They were slightly more likely both to use the Internet, and to book over the Internet. They were also more likely to use guidebooks.
- Although one might expect adventure travelers to be significantly younger, they reported an average age only four years younger than the overall rural market (46.7 compared to 50.1 years).

Fishing Visitors (page 21)

- Fishing visitors differed from the overall rural market in several significant ways.
- They visited fewer places throughout the state. They were particularly less likely to visit Denali (28 versus 46 percent) and Fairbanks (15 versus 47 percent).
- Fishing visitors stayed slightly longer in the state, although they participated in fewer activities.
- The fishing market was more likely use their prior experience as a source of information, but less likely to mention most other sources.
- They were more likely to have been to Alaska before (52 versus 42 percent).
- They were more likely to be from the West, and half as likely to be international.
- Fishing visitors were more likely to be male (69 versus 59 percent).

Rural Visitor Niche Market Analysis: Repeat Alaska Visitors
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	All Rural Visitors	Repeat Alaska Visitors
Trip Purpose		
Vacation/pleasure	82%	73%
Visiting friends/family	14	23
Business/pleasure	4	4
Overnight Destinations (Top 5)		
Anchorage	62%	56%
Denali/Healy/Cantwell	46	31
Fairbanks	27	19
Seward	27	19
Tok	22	11
Average length of stay in Alaska	12.5 nights	12.3 nights
Activities (Top 5)		
Shopping	61%	50%
Wildlife viewing	59	50
Fishing	46	57
Cultural activities	46	36
Hiking/nature walk	44	34
Average amount spent on Alaska trip	\$1,767 per person	\$1,716 per person
Previous and Future Alaska Travel		
Been to Alaska before	42%	100%
Very likely to travel to Alaska in the future	61	71
Trip Planning		
Average advance time for trip decision	8.2 months	7.4 months
Average advance time for trip booking	3.9 months	3.7 months
Used Internet	75%	73%
Booked over Internet	50	53
Used travel agent	25	25
Demographics		
West	45%	60%
Midwest	15	12
South	15	11
East	11	9
International	15	7
Average party size	2.7 people	2.6 people
Average age	50.1 years	52.4 years
Male	59%	63%
Female	41	37

Rural Visitor Niche Market Analysis: Cultural Visitors
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	All Rural Visitors	Cultural Visitors
Trip Purpose		
Vacation/pleasure	82%	86%
Visiting friends/family	14	10
Business/pleasure	4	4
Overnight Destinations (Top 5)		
Anchorage	62%	73%
Denali/Healy/Cantwell	46	64
Fairbanks	27	46
Seward	27	37
Tok	22	27
Average length of stay in Alaska	12.5 nights	14.1 nights
Activities (Top 5)		
Shopping	61%	77%
Wildlife viewing	59	74
Fishing	46	35
Cultural activities	46	100
Hiking/nature walk	44	53
Average amount spent on Alaska trip	\$1,767 per person	\$1,869 per person
Previous and Future Alaska Travel		
Been to Alaska before	42%	33%
Very likely to travel to Alaska in the future	61	49
Trip Planning		
Average advance time for trip decision	8.2 months	8.6 months
Average advance time for trip booking	3.9 months	4.1 months
Used Internet	75%	77%
Booked over Internet	50	50
Used travel agent	25	26
Demographics		
West	45%	36%
Midwest	15	16
South	15	15
East	11	14
International	15	18
Average party size	2.7 people	2.7 people
Average age	50.1 years	51.4 years
Male	59%	49%
Female	41	51

Rural Visitor Niche Market Analysis: Wildlife Viewing Visitors
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	All Rural Visitors	Wildlife Viewing Visitors
Trip Purpose		
Vacation/pleasure	82%	82%
Visiting friends/family	14	13
Business/pleasure	4	5
Overnight Destinations (Top 5)		
Anchorage	62%	68%
Denali/Healy/Cantwell	46	60
Fairbanks	27	35
Seward	27	37
Tok	22	17
Average length of stay in Alaska	12.5 nights	14.2 nights
Activities (Top 5)		
Shopping	61%	67%
Wildlife viewing	59	100
Fishing	46	40
Cultural activities	46	58
Hiking/nature walk	44	54
Average amount spent on Alaska trip	\$1,767 per person	\$1,774 per person
Previous and Future Alaska Travel		
Been to Alaska before	42%	36%
Very likely to travel to Alaska in the future	61	55
Trip Planning		
Average advance time for trip decision	8.2 months	7.9 months
Average advance time for trip booking	3.9 months	4.0 months
Used Internet	75%	78%
Booked over Internet	50	55
Used travel agent	25	27
Demographics		
West	45%	42%
Midwest	15	16
South	15	16
East	11	12
International	15	13
Average party size	2.7 people	2.8 people
Average age	50.1 years	49.8 years
Male	59%	53%
Female	41	47

Rural Visitor Niche Market Analysis: Adventure Travelers
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	All Rural Visitors	Adventure Travelers
Trip Purpose		
Vacation/pleasure	82%	80%
Visiting friends/family	14	16
Business/pleasure	4	4
Overnight Destinations (Top 5)		
Anchorage	62%	66%
Denali/Healy/Cantwell	46	50
Fairbanks	27	26
Seward	27	31
Tok	22	24
Average length of stay in Alaska	12.5 nights	13.9 nights
Activities (Top 5)		
Shopping	61%	68%
Wildlife viewing	59	65
Fishing	46	41
Cultural activities	46	52
Hiking/nature walk	44	77
Average amount spent on Alaska trip	\$1,767 per person	\$1,709 per person
Previous and Future Alaska Travel		
Been to Alaska before	42%	35%
Very likely to travel to Alaska in the future	61	60
Trip Planning		
Average advance time for trip decision	8.2 months	8.2 months
Average advance time for trip booking	3.9 months	3.9 months
Used Internet	75%	80%
Booked over Internet	50	55
Used travel agent	25	22
Demographics		
West	45%	40%
Midwest	15	14
South	15	16
East	11	12
International	15	18
Average party size	2.7 people	2.8 people
Average age	50.1 years	46.7 years
Male	59%	55%
Female	41	45

Rural Visitor Niche Market Analysis: Fishing Visitors
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	All Rural Visitors	Fishing Visitors
Trip Purpose		
Vacation/pleasure	82%	82%
Visiting friends/family	14	14
Business/pleasure	4	3
Overnight Destinations (Top 5)		
Anchorage	62%	53%
Denali/Healy/Cantwell	46	28
Fairbanks	27	15
Seward	27	24
Tok	22	18
Average length of stay in Alaska	12.5 nights	13.5 nights
Activities (Top 5)		
Shopping	61%	55%
Wildlife viewing	59	51
Fishing	46	100
Cultural activities	46	35
Hiking/nature walk	44	38
Average amount spent on Alaska trip	\$1,767 per person	\$1,778 per person
Previous and Future Alaska Travel		
Been to Alaska before	42%	52%
Very likely to travel to Alaska in the future	61	74
Trip Planning		
Average advance time for trip decision	8.2 months	8.5 months
Average advance time for trip booking	3.9 months	4.0 months
Used Internet	75%	77%
Booked over Internet	50	52
Used travel agent	25	21
Demographics		
West	45%	52%
Midwest	15	15
South	15	16
East	11	10
International	15	8
Average party size	2.7 people	3.1 people
Average age	50.1 years	49.0 years
Male	59%	69%
Female	41	31

This chapter compares 2005 survey results to 2003 survey results for the rural visitor market. The following page presents a summary table of results for the two years.

- The rural market changed very little between 2003 and 2005 in many areas: trip purpose, previous and future travel to Alaska, travel agent usage, gender, average age, and average party size.
- The average length of stay in Alaska decreased from 16.2 to 12.5 nights. This is likely related to the decline in the highway and ferry markets, which tend to stay longer in the state when compared to the air market.
- A related issue is the rate of visitation to certain communities. Anchorage visitation went up, while Fairbanks and Tok visitation went down. Highway visitors are more likely to visit Fairbanks and Tok; air visitors are more likely to visit Anchorage.
- The percentage of rural visitors who participated in shopping and wildlife viewing increased slightly, while the percentage who went fishing dropped slightly.
- The average advance time for deciding to travel to Alaska dropped slightly from an average of 8.8 months to 8.2 months. Likewise, the advance time for booking travel arrangements slipped from 4.3 to 3.9 months.
- Internet usage rose slightly, from 69 to 75 percent of visitors. Booking over the Internet increased more dramatically, from 34 to 50 percent.
- More visitors came from the West in 2005 – again, this likely related to the rise of the air market in comparison to the highway market. The air market tends to draw more from the Western states.

Rural Visitor Trend Analysis: 2003 and 2005
Alaska Travelers Survey, Non-Cruise Visitors

	Rural Visitors 2003	Rural Visitors 2005
Trip Purpose		
Vacation/pleasure	82%	82%
Visiting friends/family	13	14
Business/pleasure	6	4
Overnight Destinations (Top 5)		
Anchorage	58%	62%
Denali/Healy/Cantwell	49	46
Fairbanks	34	27
Seward	28	27
Tok	34	22
Average length of stay in Alaska	16.2 nights	12.5 nights
Activities (Top 5)		
Shopping	54%	61%
Wildlife viewing	51	59
Fishing	52	46
Cultural activities	48	46
Hiking/nature walk	38	44
Average amount spent on Alaska trip	\$1,591 per person	\$1,767 per person
Previous and Future Alaska Travel		
Been to Alaska before	41%	42%
Very likely to travel to Alaska in the future	62	61
Trip Planning		
Average advance time for trip decision	8.8 months	8.2 months
Average advance time for trip booking	4.3 months	3.9 months
Used Internet	69%	75%
Booked over Internet	34	50
Used travel agent	25	25
Demographics		
West	36%	45%
Midwest	18	15
South	17	15
East	12	11
International	16	15
Average party size	2.5 people	2.7 people
Average age	51.4 years	50.1 years
Male	58%	59%
Female	42	41

This chapter presents survey results based to non-cruise visitors who did not spend a night in any rural locations (“urban-only”), alongside rural visitor results. This exercise allows rural visitor marketing professionals insight into the Alaska visitor market they are missing, and how to better attract them.

Visitors qualified as urban-only if their trip did not include any overnights in any community of 6,500 or less not connected by road or rail to Anchorage or Fairbanks OR with a population of 1,600 or less that is connected by road or rail to Anchorage or Fairbanks. The sample size for urban-only visitors is 1,145.

Below are major findings from the rural/urban analysis; the following page presents survey results for the two markets.

- Urban-only visitors were much less likely to be traveling for vacation/pleasure (45 percent versus 83 percent), and much more likely to be VFR’s (43 versus 14 percent) when compared to the rural market. They were also more likely to be traveling for business/pleasure (12 versus 4 percent).
- Urban-only visitors overnighted in an average of 1.5 communities in Alaska, compared to 3.7 communities among rural visitors. Their top community to visit was Anchorage at 53 percent. They visited very few other communities – the next most popular community was Kenai/Soldotna at 14 percent.
- This market stayed in Alaska an average of 9.0 nights – about three nights less than the rural market.
- Urban visitors were equally likely to participate in fishing and shopping, but were less likely to do cultural activities, hiking, and many other activities. They were more likely to participate in visiting friends and family (46 versus 27 percent).
- Urban visitors spent about half of what rural visitors spent on their trip.
- This market was much more likely to have been to Alaska before (62 versus 42 percent).
- The average lead time among urban visitors for trip planning was shorter than among rural visitors.
- Urban visitors were equally likely to use the Internet, but are more likely to book over the Internet.
- The Western US represented over half of urban visitors to Alaska. This compares to 45 percent of rural visitors.
- Just 4 percent of urban visitors were international, compared to 15 percent of rural visitors.
- Urban visitors reported a lower party size than the rural visitor market – 2.3 people, compared to 2.7 people.

Rural Visitor Niche Market Analysis: Urban-Only
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	Rural Visitors	Urban-Only Visitors
Trip Purpose		
Vacation/pleasure	82%	45%
Visiting friends/family	14	43
Business/pleasure	4	12
Overnight Destinations (Top 5)		
Anchorage	62%	53%
Denali/Healy/Cantwell	46	-
Fairbanks	27	11
Seward	27	10
Tok	22	-
Average length of stay in Alaska	12.5 nights	9.0 nights
Activities (Top 5)		
Shopping	61%	62%
Wildlife viewing	59	34
Fishing	46	46
Cultural activities	46	31
Hiking/nature walk	44	30
Average amount spent on Alaska trip	\$1,767 per person	\$984 per person
Previous and Future Alaska Travel		
Been to Alaska before	42%	62%
Very likely to travel to Alaska in the future	61	73
Trip Planning		
Average advance time for trip decision	8.2 months	6.0 months
Average advance time for trip booking	3.9 months	3.1 months
Used Internet	75%	76%
Booked over Internet	50	59
Used travel agent	25	25
Demographics		
West	45%	62%
Midwest	15	14
South	15	13
East	11	8
International	15	4
Average party size	2.7 people	2.3 people
Average age	50.1 years	50.5 years
Male	59%	58%
Female	41	42

The tables in this section present additional data on rural visitors to Alaska, with detail by trip purpose (vacation/pleasure, visiting friends/relatives, and business/pleasure) and mode of exit (air, ferry, and highway). The sample sizes can be seen in the table below.

**Sample Sizes of Rural Visitors
by Trip Purpose and Mode of Exit**
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

Sample Sizes	
All rural visitors	1,175
Vacation/pleasure	945
Visiting friends/relatives	173
Business/pleasure	57
Exited by air	785
Exited by ferry	203
Exited by highway	187

Trip Purpose
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	Rural Visitors	Air	Ferry	Highway
Vacation/pleasure	82%	78%	89%	96%
Visiting friends and relatives	14	17	8	3
Business/pleasure	4	5	4	2

Accommodations Used in Alaska
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	Rural Visitors	V/P	VFR	B/P	Air	Ferry	Hwy
Hotel/motel	53%	56%	31%	58%	60%	51%	24%
Lodge/resort	28	31	20	14	35	11	9
Camping (tent/cabin)	28	27	32	26	30	26	19
Private home	25	15	80	30	31	14	3
RV/vehicle	21	23	13	6	10	35	64
Bed and breakfast	12	13	8	14	14	19	3
Boat/ferry	10	10	5	11	5	97	2
Other	6	6	3	12	7	10	-

Overnight Destinations
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	Rural Visitors	V/P	VFR	B/P	Air	Ferry	Hwy
Southcentral	78%	79%	74%	72%	81%	65%	71%
Anchorage	62	64	52	59	67	45	45
Kenai Peninsula	44	46	38	25	45	47	40
Seward	27	30	14	14	29	30	19
Homer	19	19	17	13	17	27	24
Kenai/Soldotna	14	15	10	8	11	18	23
Valdez	14	16	6	8	12	16	22
Palmer/Wasilla	11	11	11	12	10	16	17
Talkeetna	11	12	9	8	13	6	6
Glennallen/Copper Center	9	9	6	10	8	18	10
Girdwood/Alyeska	3	3	-	4	4	1	-
Interior	63	66	44	58	54	67	98
Denali/Healy/Cantwell	46	49	34	45	46	44	47
Fairbanks	27	30	16	19	26	48	27
Tok	22	25	7	5	4	41	90
Southeast	22	23	17	21	21	86	7
Juneau	8	9	5	6	8	29	1
Ketchikan	4	4	2	5	4	16	-
Sitka	2	2	2	2	1	13	1
Skagway	6	6	2	1	4	34	4
Haines	5	5	2	4	2	48	4
Prince of Wales Is.	4	3	4	4	4	6	1
Petersburg	3	3	2	3	3	6	-
Glacier Bay/ Gustavus	2	2	1	1	3	4	-
Wrangell	1	1	2	2	1	9	-
Southwest	10	11	7	14	13	1	3
Kodiak	2	2	<1	4	2	1	2
Far North	5	5	3	10	5	4	5
Nome	2	1	1	4	1	1	2

Participation in Tours and Activities
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	Rural Visitors	V/P	VFR	B/P	Air	Ferry	Hwy
Shopping	61%	62%	57%	48%	55%	67%	84%
Wildlife/marinelife viewing	59	59	53	73	62	85	34
Bear viewing	28	29	20	30	27	51	21
Bird watching	16	16	14	20	17	27	8
Fishing	46	46	46	36	48	35	43
Fishing (unguided)	28	28	33	21	27	26	34
Fishing (guided)	25	27	16	22	28	17	15
Cultural activities	46	48	34	38	43	71	48
Museums/ historical sites	37	39	29	21	34	64	39
Native culture tours/ activities	18	19	11	15	19	30	12
Gold panning/ mine tour	11	12	7	7	11	15	13
Hiking/nature walk	44	44	47	43	43	45	46
Day cruise	43	45	34	25	44	43	36
Visiting friends/relatives	27	17	82	30	32	26	6
City tour	25	25	23	22	26	48	14
Camping	20	20	18	22	16	32	31
Boating	17	15	26	13	19	10	9
Flightseeing	16	16	15	11	17	13	13
Train	13	14	5	14	13	25	8
Alaska Railroad	9	10	3	13	11	4	4
White Pass	4	5	1	1	3	23	4
Rafting	13	13	12	5	14	7	9
Kayaking/canoeing	9	8	14	5	9	7	6
Tramway/gondola	5	5	3	2	5	7	2
Business	5	2	1	75	6	1	1
Biking	4	4	4	3	4	5	4
Hunting	3	3	3	-	3	1	3
Dog sled/kennel tour	2	2	1	-	2	1	-
Garden/rainforest tour	1	1	3	-	1	1	-
Other activities	11	12	6	8	10	13	12

Advance Time for Trip Decision and Booking
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	Rural Visitors	V/P	VFR	B/P	Air	Ferry	Hwy
How far in advance did you decide to come on this trip to Alaska?							
3 months or less	27%	23%	46%	36%	30%	22%	14%
4-6 months	29	29	30	37	32	22	22
7-11 months	15	16	10	3	14	17	16
1 year or more	29	32	15	23	24	38	47
Average # months	8.2	8.8	5.4	6.4	7.1	9.1	12.4
How far in advance did you book your major travel arrangements?							
3 months or less	51%	47%	69%	71%	49%	65%	56%
4-6 months	33	35	23	22	34	22	29
7-11 months	11	12	7	2	11	13	7
1 year or more	5	6	1	4	5	1	9
Average # months	3.9	4.2	2.9	3.1	4.1	2.8	3.6

Internet Use
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	Rural Visitors	V/P	VFR	B/P	Air	Ferry	Hwy
Used Internet	75%	77%	69%	67%	79%	71%	64%
Research only	26	28	13	26	20	42	44
Research and book	50	49	56	41	59	29	20
Which portions of your trip did you book over the Internet? (Base: Booked over the Internet)							
Airfare	83%	81%	96%	83%	87%	19%	64%
Lodging	41	45	18	48	42	49	27
Vehicle rental	33	37	17	25	32	14	55
Tours	22	25	11	15	22	38	24
Ferry	8	9	2	-	5	79	12
Overnight packages	4	5	-	-	5	-	3
Other	3	3	1	-	2	4	9

Travel Agent Use
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	Rural Visitors	V/P	VFR	B/P	Air	Ferry	Hwy
Did you use a travel agent?							
Yes	25%	26%	18%	28%	28%	17%	14%
No	75	74	82	72	72	83	86
Which portions of your trip did you book through a travel agent? (Base: used travel agent)							
Airfare	80%	78%	89%	100%	81%	42%	87%
Lodging	52	55	11	35	54	49	43
Tours	47	49	11	35	50	52	26
Vehicle rental	22	23	7	10	16	9	61
Overnight packages	12	13	-	-	14	-	9
Ferry	9	9	11	-	4	88	-
Other	2	2	-	-	1	3	4

Information Sources About Alaska
(Other than Internet and Travel Agent)
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	Rural Visitors	V/P	VFR	B/P	Air	Ferry	Hwy
Friends/family	44%	39%	77%	28%	47%	46%	30%
Guidebooks	31	33	24	26	26	54	44
Milepost	16	17	14	9	11	37	32
Frommers	5	5	5	6	5	5	8
Lonely Planet	5	6	2	7	4	10	7
Prior experience	26	23	44	25	30	32	9
Brochures	18	20	12	10	12	29	40
AAA	9	10	4	11	7	24	14
Magazine	8	9	4	9	7	14	11
Convention and Visitors Bureau	6	7	2	7	3	7	18
Ferry brochure/ schedule	6	7	2	4	2	39	11
Community brochures	6	7	3	1	2	11	18
Library	3	4	<1	-	3	4	4
Alaska State Vacation Planner	3	3	2	-	3	5	3
Lodging	1	1	-	1	1	1	2
Club/organization	2	3	-	5	1	4	6
Travel shows	2	2	-	-	2	4	-
Newspaper	2	2	-	-	1	5	3
Cruise line	1	2	-	-	1	1	3
North to Alaska Guide	1	2	-	-	<1	1	7
None	3	2	4	3	3	1	3
Other	7	8	1	13	4	2	24

Previous and Future Alaska Travel
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	Rural Visitors	V/P	VFR	B/P	Air	Ferry	Hwy
Is this your first trip to Alaska?							
Yes	58%	63%	32%	55%	52%	61%	83%
No	42	37	68	45	48	39	17
Mode of transportation used to enter/exit Alaska on previous trip (Base: Previously visited Alaska)							
Air	72%	68%	85%	65%	77%	31%	35%
Highway	14	16	8	11	9	36	48
Cruise ship	10	11	5	21	10	15	7
Ferry	4	3	4	9	2	36	-
Other	1	1	-	-	1	-	-
How likely are you to return to Alaska?							
Very likely	61%	58%	73%	74%	63%	41%	57%
Likely	22	23	16	23	21	25	23
Unlikely	10	11	5	1	8	23	14
Very unlikely	3	3	3	-	3	1	5

Visitor Origin
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	Rural Visitors	V/P	VFR	B/P	Air	Ferry	Hwy
Western US	45%	41%	64%	51%	52%	34%	21%
California	16	16	17	14	20	8	4
Washington	9	7	17	4	10	9	5
Oregon	5	4	9	6	6	6	3
Midwestern US	15	14	18	16	15	23	10
Michigan	2	2	3	8	2	5	3
Wisconsin	2	3	1	-	2	5	1
Illinois	2	2	2	-	2	3	1
Southern US	15	16	10	3	13	13	23
Texas	4	5	1	1	4	3	7
Florida	3	3	4	-	2	4	6
Eastern U.S.	11	11	5	18	12	7	6
New York	2	2	2	-	3	1	1
Pennsylvania	2	2	<1	6	2	2	1
International	15	18	3	12	9	22	39
Germany	3	4	-	-	1	2	14
Canada	3	3	2	7	1	6	6
United Kingdom	2	2	-	4	2	2	-
Australia	2	2	-	-	1	3	3

Visitor Demographics
Alaska Travelers Survey, Non-Cruise Visitors, Summer 2005

	Rural Visitors	V/P	VFR	B/P	Air	Ferry	Hwy
Gender (cumulative)							
Male	59%	61%	45%	69%	61%	52%	55%
Female	41	39	55	31	39	48	45
Age (cumulative)							
1-18 years old	8%	8%	13%	7%	9%	10%	5%
19-34 years old	14	13	17	27	15	11	10
35-44 years old	13	14	10	20	13	9	18
45-64 years old	47	49	38	38	48	41	46
Over 65 years old	17	17	22	8	15	29	20
Average age	50.1	50.5	49.5	45.1	49.7	54.7	50.2
Average party size	2.7	2.8	2.2	3.0	2.8	2.5	2.6
Education							
Less than H.S. diploma	2%	2%	3%	-	1%	1%	4%
High School Grad/GED	17	17	20	17	13	15	34
Vocational Cert.	6	6	4	1	4	8	12
Some College	15	15	14	10	12	14	25
AA degree	6	6	3	9	7	5	2
College graduate	53	52	54	62	60	55	21
Bachelor's	26	25	30	26	8	34	13
Master's	18	18	19	28	21	16	7
Doctorate	9	9	6	7	11	5	1
Average household income							
Mean income	\$91,200	\$92,300	\$85,600	\$88,500	\$97,500	\$80,200	\$71,000
Refused	12%	12%	12%	20%	14%	8%	5%